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Performance DNA Knowledge Base Articles

Nice IEX OrgData Tips

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Nice IEX OrgData Tips

Software product name	Skills Mangement
Version Number	8.5.x and Above
Subject	Nice IEX OrgData Tips

Symptoms

- WFM users not being imported by OrgData.
- Agents not being Placed under their Manager in the User Hierarchy
- User data missing from import

Resolution

WFM users not being imported by OrgData

In order for OrgData to pull user data from NICE IEX WFM the User must have the following Agent Data Groups (ADGs) or Agent Data Values (ADV's) if these are missing or not unique OrgData may see the User as invalid and remove them from the import:

- Skills Manager Role
 - This is a custom ADG that is used to identify Users that are Trainers, Managers or Agents
- Managers ID
 - This ADG is used to store the User's Line Manager's Employee ID. We use this to map Users to their Manager when creating the reporting hierarchy.
- EmployeeID
 - This should be populated and unique as it is typically used as a key field when mapping Users within the system.
- MU Name
 - MU Name can be collated as a standard OrgData field. This can be very useful when filtering the Users to be imported as custom scripts can be used to remove specific MU's from the import data.

Agents not being Placed under their Manager in the User Hierarchy

There are 3 possible causes of User Hierarchy not being built correctly:

1. The LMPositionID field in OrgData is not mapped to the WFM User field that contains the Agent's Manager's Employee ID.
2. The PositionID field in OrgData is not mapped to a field that contains a unique value.
3. WFM has not had the Manager's Employee ID entered against the Agent in the correct ADG.

User data missing from import

The most common cause for missing data is a mismatch in the mapping of the OrgData fields with WFM. Most issues can be resolved by checking the field/column names in the OrgData Config xml for spelling and formatting errors such as:

- "EmployeID" rather than "EmployeeID"
- "LeadEmploymentID" rather than "Lead Employment ID"

When mapping OrgData fields to WFM User data fields the field/column names must match exactly. Some WFM ADGs may contain spaces or special characters.

General Tips

- Employee ID is mandatory and must be unique, if duplicates are found the OrgData process will stop and the import will fail.
- ADG can often have a rouge <space> at the beginning or end of the name causing a mapping mismatch.
- When creating the Import Template the field that maps to LoginID must contain unique values. Duplicates will cause the push of data to Performance DNA to fail.

Sample OrgData Config file Mapping

```
<ImportSources
CsvFilePath=""
BackupFilePath=""
PostImportSql="">
  <Source Type="Wfm" ID="1" MergeMethod="Append">
    <Mapping Field="Username" WfmField="EmployeeId" />
    <Mapping Field="EmployeeID" WfmField="EmployeeId" IsKey="true" />
    <Mapping Field="PositionID" WfmField="EmployeeId"/>
    <Mapping Field="WfmUserId" WfmField="UserId" />
    <Mapping Field="FirstName" WfmField="FirstName" />
    <Mapping Field="LastName" WfmField="LastName" />
    <Mapping Field="Email" WfmField="Email" />
    <Mapping Field="LMPositionID" WfmField="Team Manager ID" />
    <Mapping Field="Site" WfmField="Site" />
    <Mapping Field="Team" WfmField="Team" />
    <Mapping Field="TrainingPlannerRole" WfmField="Training Planner Role" />
  </Source>
</ImportSources>
```